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ABSTRACT

The purpose of this report is to summarize the activities and status of the Southwestern Library Interstate Cooperative Endeavor (SLICE) Project during the second quarter of the Council on Library Resources (CLR) funding. The report highlights progress, identifies problems, and outlines the future direction of the Project. Consistent with the objectives of the CLR grant the project SLICE/MARC-O (MARC development operated by the Oklahoma Department of Libraries) received top priority. Project objectives were twofold: (1) enhance the use of various MARC-O services by libraries in the six Southwestern Library Association (SWLA) states, and (2) develop a strategy and plan for future MARC-O operations. The second SLICE project was the establishment and funding of CELS (Continuing Education for Librarians in the Southwest). As part of their Regional Institute for Training in Library Service for the Disadvantaged Project, SLICE is to co-sponsor a model, regional workshop on library service for the southwest region. The remainder of the report contains: possible new projects, extracurricular activity, and budget and finance. (The first quarterly report is available as LI 003 768.) (NH)

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SOUTHWESTERN LIBRARY INTERSTATE COOPERATIVE ENDEAVOR (SLICE)

A Project of the

SOUTHWESTERN LIBRARY ASSOCIATION

TO PROMOTE ALL LIBRARY INTERESTS IN THE SOUTHWEST AND MEXICO

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S.L.I.C.E.

Second Quarterly Report

for the Period

January 1, 1972 to March 31, 1972

LI 003 769

Prepared by Maryann Duggan
SLICE Office Director
April 18, 1972

SLICE Second Quarterly Report

SUMMARY

During this second quarter, the major thrust of SLICE Office activities was related to continuing the SLICE/MARC-O project - particularly the educational and the planning components. Ten SLICE/MARC-O workshops were held in five states involving participation of 389 persons. The second edition of the SLICE/MARC-O Description Of Services Brochure was printed, as was the Users Manual On Search And Copy Service. A total of fifteen new users from four states actually ordered various services directly from MARC-O. Several "innovative" applications of MARC-O at the state or local level were implemented or are in the planning stage. A SLICE/MARC-O Planning Task Force was established and met once during the quarter to begin to develop objectives and strategy for the second year of the SLICE/MARC-O Project. The essence of the planning objective is to incrementally develop a multi-state network of state MARC "service centers" interconnected by telecommunication with the MARC-O Data Base.

The Continuing Education for Librarians in the Southwest (CELS) project was approved by the SLICE Council, and specific planning for the six state survey and a one and one-half day SWLA/SELA Preconference Institute has progressed. The topics of the Preconference will be "Planning and Evaluation of Library Programs". The Ohio State University Evaluation Center staff has been invited to participate. It is anticipated that twenty librarians from fifteen states (i. e., total 300) will be in attendance. Due to lack of time, the CELS project received only secondary attention in this quarter.

Seven possible new SLICE projects were reviewed by the SLICE Council and appropriate action taken.

On March 3rd the Council met and approved a reorganized structure which will strengthen its continuance. Eleven viable functions for the second year of SLICE were identified by the Council and a funding strategy for the second year of the SLICE Office adopted.

Communication lines between the SLICE Office and the six states were strengthened. An analysis of correspondence, visits, and long distance calls shows the true interstate nature of the project. A mailing list data bank of key librarians and trustees in the six states was established with the help of the Advisory Council. This data bank contains 289 names. "Getting the SLICE word out" within the region has been more expensive than anticipated, yet was thought to be essential to the development of the SLICE concept.

Budget data indicate very tight funding for the remainder of the twelve months' CLR grant. CELS funding has been assessed at $11,000 level. Additional funding for the SWLA/SELA Preconference Institute is being sought from the Office of Education. Total expenditures on the $25,000 CLR grant through the second quarter are $12,314.68, leaving a balance of $12,738.32 for the next six months.

In brief summary of this quarter's progress, SLICE continues to be an "action" program leading toward a carefully constructed regional plan for long-term interstate services. In general, with the exception of CELS, the SLICE Project progress this quarter followed the Implementation Schedule presented in the First Quarterly Report. The next two quarters will "tell the story"!!

TABLE OF CONTENTS

		page
I.	Slice Office and Project Management	1
II.	Project No. 1: SLICE/MARC-O	6
III.	Project No. 2: CELS	13
IV.	Project No. 3: Regional Institute for Training in Library Service for the Disadvantaged .	14
V.	Possible New SLICE Projects	15
VI.	Extracurricular Activities	17
VII.	Budget and Finance	18
VIII.	Acknowledgements	19

IX. Attachments

A. SLICE Council Meeting Report, March 3, 1972

B. SLICE Council Task Force Meeting, March 28, 1972

C. CELS Job Descriptions: Project Director and State Surveyors

D. Budget and Expenditure Detail

SECOND SLICE QUARTERLY REPORT

January 1, to March 31, 1972

The purpose of this report is to summarize the activities and status of the SLICE Project during the second quarter of the Council on Library Resources funding. This report is intended to highlight progress, to identify problems, and to outline future direction of the Project. Separate Monthly Progress Reports for January and February are available for supplementary detail information, if desired.

A limited number of copies of the First SLICE Quarterly Report (October 1, to December 31, 1971) are also available for those desiring a complete record of the SLICE Project to date.

I. SLICE Office and Project Management

The First SLICE Quarterly Report contained a modified PERT Chart (Attachment A) for the scheduling of proposed activities during the twelve months' funding period. In general, this schedule has been followed during the second quarter. Some of the "events" have occurred earlier than scheduled and some are lagging the schedule. These are identified in the appropriate section of this report. Due to the death of SLICE Office Director's (S.O.D.) Mother on January 10th, S.O.D. went on 50% leave without pay for the months of February and March, thus slowing down the schedule to some extent. But, basically, the SLICE Implementation Schedule as presented in the First Quarterly Report has been followed as a guide to project management this quarter.

The SLICE Project goals this quarter continued to be threefold:

(1) To enhance interstate, regional application of the MARC Data Base and related services developed by the Oklahoma Department Of Libraries (MARC-O).

(2) To develop a practical continuing education strategy program for library personnel in the six states (CELS).

(3) To determine the viability of an interstate, regional organization (SLICE) designed to catalyze collaborative sharing of resources and expertise among the six states in the SWLA region and to develop plans for continuance of SLICE activity beyond the initial twelve months' CLR funding.

The SLICE Advisory Council* met once during this quarter (March 3rd). Summary of this meeting is enclosed as Attachment A. Suggested revision of the composition and service term of the Council was approved during the March 3rd meeting in order to strengthen the Council. Details of this reorganization are reported in Attachment A. In general, the Council approved the SLICE Project progress and plans for the rest of the

*Composed of the six state librarians and representatives from the six state library associations.

first year. The Council continued to suggest "action programs" for SLICE and identified several for the second year of operation. (See Section IV of this report.) A strategy for funding the SLICE Office for the second year was approved by the Council. Of the proposed $25,000 SLICE Office budget, state library agencies will be asked to contribute $24,000 and SWLA will contribute $1,000.**. In keeping with the philosophy of SLICE, it is hoped that the MARC-O project can be funded by an outside source and operated as an independent project next year. The Council approved the appointment of a SLICE/MARC-O Planning Task Force, charged to develop specific plans for this project next year. (See Section II of this report.)

The SLICE Office continued to serve as a "communication link" in the region. A total of 121 letters was initiated by the office during this quarter. Long distance telephone calls increased in number and multi-state contact. An analysis of the geographic pattern of these two types of communication links is presented in the enclosed tables.

On the suggestion of the Advisory Council, a "data bank" of addresses of thirty to forty key librarians in each of the six states was compiled and set up in the UTSMS computer. A total of 289 names is now in the SLICE address file available for computer produced mailing labels at 01¢/label.

Personal travel by SLICE Office Director increased during the month thereby hopefully improving communications in the region. An analysis of S.O.D.'s travel by geographic area is presented on the enclosed table. S.O.D. has been invited to present the SLICE story to each of the six state library associations spring conferences. On March 24 and 25, S.O.D. met with the Louisiana Library Association and presented a brief talk at the Third General Session and at the meeting of the Library Development Committee Of Louisiana.

Professional library press in the region assisted in getting the SLICE message out to the librarians in the six states. During this quarter, "copy" was published in the following:

1. Louisiana Library Association Bulletin, Vol. 34, No. 4, Winter, 1972, pp. 125-128.

2. Texas Libraries, Vol. 33, No. 4, Winter, 1971, pp. 221.

Short news items about SLICE were also published in Arizona, New Mexico, and Oklahoma library journals.

Additionally, a total of 124 copies of the First Quarterly Report and an estimated 100 copies of the January and February Monthly Reports were distributed by the SLICE Office.

In summary of the SLICE Office and project management activities, communication links are now established and operating and advanced planning for next year has been initiated with the intent of SLICE continuing as a viable organization responsive to the needs of the states and SWLA.

**The UTSMS representative indicated institutional support of SLICE by contribution of indirect costs for next year.

ANALYSIS OF GEOGRAPHIC DISTRIBUTION OF SLICE OFFICE CORRESPONDENCE

OCTOBER 1, 1971 TO APRIL 1, 1972*

Location Of Correspondent	1971 October	November	December	1972 January	February	March	Total
Arizona	5	-	1	2	3	7	18
Arkansas	3	-	2	1	-	2	8
Louisiana	7	-	9	2	2	13	33
New Mexico	1	4	2	3	6	1	17
Oklahoma	2	3	4	4	9	9	31
Texas	5	13	9	7	11	9	54
Total for Region	23	20	27	19	31	41	161
Out of Region	5	14	10	4	14	17	64
Total	28	34	37	23	45	58	225

*Number of letters originating out of SLICE Office. Not the number of letters received. Does not include distribution of carbon copies; SLICE Executive Committee Chairman receives carbon copies of all correspondence. The average letter has 5.0 carbon copies, thus approximately 1,125 separate letters were distributed from the SLICE Office in the first six months.

ANALYSIS OF SLICE OFFICE LONG DISTANCE TELEPHONE COSTS BY STATES

DURING FIRST SIX MONTHS*

State	October, 1971	November	December	January, 1972	February	March	Total
Arizona	-	$2.40	$4.85	$3.45	$2.75	-	$13.45
Arkansas	-	3.10	2.60	-	-	-	5.70
Louisiana	-	7.80	7.20	8.55	-	-	23.55
New Mexico	-	9.10	10.95	7.45	9.40	$5.00	41.90
Oklahoma	$12.40	31.25	40.50	33.10	33.35	11.05	161.65
Texas	1.45	21.96	48.68	6.80	7.60	8.40	94.89
Total for Region	$13.85	$75.61	$114.78	$59.35	$53.10	$24.45	$341.14
Out of Region	1.45	6.15	2.15			16.95	26.70
Total	$15.30	$81.76	$116.93	$59.35	$53.10	$41.40	$367.84

*Cost of Long Distance calls originating in SLICE Office; does not include calls received and paid for by others. Also, does not include tax.

ANALYSIS OF SLICE OFFICE DIRECTOR'S TRAVEL

EXPENDITURES BY STATES DURING FIRST SIX MONTHS

State	October, 1971	November	December	January, 1972	February	March	Total
Arizona	-	-	-	-	-	$160.80	$160.80
Arkansas	-	-	-	-	-	-	-
Louisiana	-	-	$116.30	-	-	87.25	203.55
New Mexico	-	-	-	$182.52	-	-	182.52
Oklahoma	$111.73	$114.43	-	-	$83.72	-	309.88
Texas	-	-	-	69.40	-	-	69.40
Total	$111.73	$114.43	$116.30	$251.92	$83.72	$248.05	$926.15
Out of Region	-	-	-	260.09	-	-	260.09
Total				$512.01			$1,186.24

II. Project No. 1: SLICE/MARC-O*

This project received top priority during this quarter consistent with the objectives of the CLR grant. Project objectives continued to be twofold:

(1) Enhance the use of various MARC-O services by libraries in the six SWLA states, and

(2) Develop a strategy and plan for future MARC-O operations within a regional, multi-state structure in order to stimulate sharing of library resources within the region.

The philosophy and implementation plans developed during the first quarter were followed. In summary, emphasis was on (1) educational effort to acquaint the libraries in the region with available MARC-O services and (2) planning discussions with state library agencies, academic consortia, and "library systems" on the possible role of MARC-O data base services in developing an "organizational and service structure" within a state.

The "workshop" format developed in the first quarter was used as the major educational component. With the help of Mr. Kenneth Bierman, the SLICE Office conducted a total of ten workshops involving 389 persons in five states. These are summarized on the enclosed table. An analysis of these data indicate 37% of the attendees were from academic libraries and 28% were from public or state library agencies. School library personnel constituted 11% of the attendees and the remaining attendees were composed of special libraries or data processing personnel. The unexpectedly large number of attendees at these workshops is a firm indication of the strong interest in MARC and SLICE in this region. There is good evidence from discussion, follow-up letters, and follow-up use of the MARC-O Data Base that the workshops have been successful in communicating with the library community in these six states.

As part of the educational component, a new edition of the SLICE/MARC-O Description Of Services Brochure was printed and distributed. A new edition of the Users Manual on the Search And Print Services was also printed and distributed. Copies of these are enclosed.**

How effective are these workshops in achieving the goals of this project? Do the workshops increase the level of understanding about MARC-O services and potential applications? Do the workshops lead to "behavioral change" as measured by new users of MARC-O or new applications of MARC-O capabilities? Do states or groups of libraries "restructure" their services or organization to take advantage of the MARC-O potential? Are the "right" persons participating in the workshops? What is the "benefit/cost" ratio of the workshops? These are questions which the SLICE/MARC-O Project will attempt to answer during the life of the project.

One method being used to evaluate the workshops is a "pre-test" and "post-test" opinionaire. To date, 254 valid pre-test opinionaires have been collected. Mrs. Arlene Paup, a graduate library science student at Drexel

*MARC-O is the acronym used for the MARC development operated by the Oklahoma Department Of Libraries

**Only with the 25 copies distributed to CLR; other recipients of this report have previously received copies. Additional copies are available from the SLICE Office on request.

SUMMARY OF SLICE/MARC-O WORKSHOPS

FOR THE PERIOD OCTOBER 1, 1971 TO APRIL 1, 1972

Place & Date Of Workshop	Sponsor	Number Of Attendees	Distribution Of Attendees By Type Of Library					Number Of Valid Pre-Workshop Opinionaires
			Public	Academic	Schools	Special	Other	
1971								
Fort Worth, Tex., 11/17	Texas Education Agency	20+	(All school media persons)					-*
Baton Rouge, La., 12/18	Louisiana State Library	33	5	14	2	3	9	26
Carrollton, Tex., 12/14	Dallas Metropolitan Area Public Library Administrators	20	(All public librarians)					-**
1972								
Santa Fe, N. Mex., 1/7	New Mexico State Library	25	3	2	4	5	10	24
San Antonio, Tex., 1/14	CORAL	97	6	61	3	19	8	61
Oklahoma City, Okla., 2/28	Oklahoma Dept. Of Libraries	21	(All state library personnel)					21
Oklahoma City, Okla., 2/29	Oklahoma County Libraries	34	17	12	2	3	-	30
Austin, Tex., 3/9	Texas State Library	30	14	11	-	5	-	-**
Phoenix, Ariz., 3/13	Arizona State Library	59	28	21	10	-	-	55
Dallas, Tex., 3/29	Dallas Public Library, TALON Regional Medical Library, and Inter-University Council	50	17	23	-	1	9	37
	TOTALS	389	110	144	41	36	57	254
	% Distribution By Type Of Library		28%	37%	11%	9%	15%	

*Opinionaire not developed at time of this workshop.
**Did not run the Opinionaire in this workshop.

University, has volunteered to evaluate this component of the SLICE/MARC-O workshop as a class project this summer through a series of follow-up opinionaires to workshop participants. A summary of the pre-test opinionaire results are on the enclosed table and indicate generally the following pre-workshop attitudes:

1] that MARC should be useful to even small libraries not having computers or staff programers;
2] that MARC should have applications other than printing catalog cards and should be of interest to more than catalogers;
3] that factual knowledge of the composition of the MARC Data Base and RECON is needed;
4] that conceptualization of telecommunications access to a MARC data base is in formative stages;
5] that a cooperative approach to using a MARC data base and structuring state library development around such a data base is conceptually acceptable;
6] that factual knowledge of a MARC-based S.D.I. service is needed.

Another method of evaluating workshop effectiveness is to measure the number of "new users" of the various MARC-O services. Mr. Bierman is keeping excellent records on users and these data will be helpful in documenting impact of the project on library operations. Based on preliminary analysis of these data, the following number of "first-time users" were generated during this quarter for certain services from each of the states:

State	SDI Standard	SDI Custom	Search & Print	Search & Copy
Arizona[1]	0	0	1	0
Arkansas[2]	0	0	0	0
Louisiana[3]	0	0	1	0
New Mexico[4]	0	0	0	0
Oklahoma[5]	1	0	6	0
Texas[6]	6	0	5	0
Total Region	7	0	13	0

[1]SLICE/MARC-O workshop held on March 13th;
[2]SLICE/MARC-O workshop not conducted in this state as of April 1st;
[3]SLICE/MARC-O workshop held on December 18th;
[4]SLICE/MARC-O workshop held on January 4th;
[5]SLICE/MARC-O workshops held on February 28th and 29th;
[6]SLICE/MARC-O workshops held on November 17th, December 14th, January 14th, March 9th, and March 29th.

SUMMARY OF PRE-TEST OPINIONAIRE

RESULTS OF SEVEN WORKSHOPS

Situation	Average Of Results*		
	Agree	Do Not Know	Disagree
1. Only a large library with its own computer can use MARC	7	17	76
2. A library would have to have a staff or consultant computer programmer to use MARC	22	14	64
3. The only use of MARC is to produce catalog cards	2	9	89
4. MARC contains foreign language material	26	34	40
5. RECON is a recataloging project at L.C.	24	54	22
6. MARC and TWX are in no way related	29	40	31
7. MARC is of interest only to catalogers	3	5	92
8. MARC is too expensive for a small individual library to subscribe direct from L.C. and too costly to implement individually	52	21	27
9. MARC could be useful in state-wide library	85	6	9
10. S.D.I. is a possible by-product of MARC for reference services	53	43	4

*Average of percent replies for seven workshops; total sample is 254 replies

The total number of LC card copy requested in the first order for the 13 new Search and Print users was 1,817. These preliminary data on "first time" users indicates some degree of workshop effectiveness in stimulating use of the MARC-O capabilities across state lines. Repeat or continuous use will be more positive evidence.

Another method of evaluating workshop effectiveness in bringing about improvement in library operations by use of MARC-O would be a measure of "innovative applications" of existing MARC-O services. Several such "innovative applications" have been initiated or are in the planning stages. In very brief summary these are:

1] Louisiana State Library Processing Center is experimenting with TWXing LC card numbers to MARC-O weekly and comparing "hits" on the MARC-O Data Base with "hits" on the NEWSET LC card service. A full report of this experiment will be presented in the final report.

2] The LNR (Louisiana Numerical Record) is a listing of monographs contained in 34 Louisiana libraries by LC card number. SLICE/MARC-O is working with the LNR Committee to determine the feasibility of interfacing this "locator tool" with the MARC-O Data Base and related services.

3] The Tucson Public Library is evaluating the feasibility of adopting the MARC-O Search and Copy Service as input to their automated system.

4] The Albuquerque School District Processing Center is also investigating the economic and technical feasibility of using the MARC-O Search and Copy Service as input into their automated book processing system.

5] The New Mexico State Library is considering using the MARC-O Search and Print Service to assist small public libraries throughout the state in reducing their "cataloging snags" and to demonstrate the value of a MARC Data Base to academic libraries.

6] CORAL (an academic consortia in San Antonio, Texas) is considering the use of MARC-O Data Base service as a way of building a regional data base on monographs related to "confluence of cultures" in the Southwest.

7] The Dallas Area Metropolitan Public Library administrators are considering setting up a MARC service center to procure MARC records from MARC-O and process these for member libraries.

The above are the major applications of MARC-O that have been discussed during the past quarter. With the exception of the LSL Processing Center experiment, all of these applications are still in the planning stages as of this date.

Perhaps the ultimate measure of the effectiveness of the SLICE/MARC-O Project is the progress made toward a regional plan or state plans for full utilization of the MARC-O capability. The long-range ultimate objective might

be creation of organizational structure providing "nodes" with varying functions interconnected with MARC-O within a compatible "systems" framework. It is too early in the project to predict progress made on this evaluation criteria but preliminary evidence is optimistic. (This objective is discussed in the section below in the SLICE/MARC-O Planning Task Force.)

During the quarter several significant developments occurred in the MARC-O operations at the Oklahoma Department Of Libraries, as reported by Mr. Bierman. The MARC Data Base underwent several transformations. On February 18th the computer was "upgraded" to the fourth generation IBM 370/155 and all processing converted to MVT. The Data Base has grown to 203,861 active MARC records. In order to accommodate the increading number of records issued by LC and still maintain a complete MARC Data Base for users, a sixth IBM 2316 disk pack was added to the system.

To give an indication of the capability of the MARC Data Base and the new system, the following experience is reported in detail. On March 10th a Search and Copy run was made for 8,328 LC card numbers submitted by the Tulsa City-County Library. Of the 8,328 numbers submitted, 88.13% (7,340) were on the Data Base as follows:

Card Numbers	Total Requests	Total Matches	% Matches
pre 68	632	34	5.4
68	330	153	45.4
69	428	410	95.8
7-series	6,938	6,743	97.2
Totals	8,328	7,340	88.13

These data prove that over 95% of the current acquisition of small and medium-size public libraries (books with imprint dates of 1969 or later) are in the MARC-O Data Base.

The retrieval time to access and retireve the MARC record continues to be very low, i. e., less than 0.5 seconds per record retrieval.

Work is continuing on the programming of the Catalog Card Set Production system. Initial programming has been completed and is now being tested and "de-bugged". Since there are over 500 options for this print program, testing will take several months. A policy on use of this program and service outside of Oklahoma will be established in the future depending on the SLICE/MARC-O Planning Task Force recommendations and the funding for MARC-O during the second year of SLICE.

The Search and Print Service continues to be used heavily since its introduction last October. Thirty-five different libraries throughout the Southwest have submitted 82 orders containing a total of 3,926 LC card numbers.

In addition to the educational effort and the MARC-O Data Base operation and provision of services, progress was made during this quarter on long-range planning of the second year of SLICE/MARC-O operations. At the March 3rd SLICE Advisory Council meeting, Mr. Brawner (SLICE Executive Committee Chairman) was authorized to establish a SLICE/MARC-O Planning Task Force. The first meeting of this Task Force was on March 28th. A summary of the Task Force action is attached. Pursuant to this meeting, further liaison with other MARC-based operations or planning groups will be accelerated

to insure compatibility and to minimize duplication. Continued effort will be made to urge the creation of MARC Regional Centers through Library Of Congress or national support. Close integration of the SLICE/MARC-O Planning effort with state library agency planning staffs will also be initiated. Development of a firm "legal base" for organizing a multi-state MARC network will also be given priority. A proposal for the operation of the second year of SLICE/MARC-O is being drafted by the Task Force and will be ready for preliminary review by May 20th.

In summary of the SLICE/MARC-O Project during this quarter, (1) the educational effort was launched full scale with reasonably satisfactory preliminary results, (2) the MARC-O Data Base and related services were further developed and were increasingly used by other states, and (3) a strategy and plan for the second year of SLICE/MARC-O was developed and action started on initiation.

III. Project No. 2: CELS*

This project is funded by each of the six SWLA region state library agencies. During the quarter, five of the six state agencies conveyed $2,000 each to SWLA. It is intended that SLICE will implement the project on contract between SWLA and UTSMS.

The need for continuing education of library staffs in the six states was given top priority by the six state representatives during the September, 1970, SLICE Planning Conference, thus the establishment and funding of CELS as the second SLICE project.

The initial CELS Project Proposal was presented as Attachment D in the First Quarterly Report, thus it will not be reviewed herein. In general, only limited progress has been made on this project during the second quarter due to emphasis on Project No. 1 (SLICE/MARC-O).

The SLICE Executive Committee met with representatives of the SWLA and SELA Educational Committees on January 24th. Agreement was reached on the objective of co-sponsoring a one and one-half day SWLA/SELA Preconference Institute on October 31-November 1, 1972. The topic for the Institute was identified as "Library Program Planning and Evaluation". It was further agreed (after discussions with Mr. Ray Fry, Division of Library Programs of the U. S. Office of Education) that the Ohio State University Planning and Evaluation Center would be invited to assist in developing the Preconference Institute on a grant from the Office of Education. This suggestion was approved by the SLICE Advisory Council on March 3rd and a formal proposal submitted to the Office of Education on March 6th. On March 27th, SLICE was advised that the proposal was of interest and arrangements were made for S.O.D. to meet with the Ohio State University people to work out details. As proposed, twenty librarians from each of the fifteen states in SWLA/SELA would participate in the Institute. Emphasis would be not only on the "content" (i. e., planning and evaluation), but on continuing education techniques and "delivery systems".

With regard to the other two components of CELS (i. e., the two surveys and development of a regional strategy), each state library association and library agency has been invited to submit names of persons who might serve as surveyors within the state. Job descriptions have been prepared for these assignments (see Attachment C) and some initial contacts made in three states. A search for a CELS Project Coordinator has been initiated and two persons interviewed during March with negative results. The role and responsibility of the CELS Project Coordinator may have to be revised or modified depending on funding and other factors.

Liaison with WICHE on the CELS project continues to insure cooperative planning and to avoid needless duplication.

It is intended to give CELS greater priority during the next two quarters. On March 29th, S.O.D. was advised by Mr. Brawner to draft a formal contract between SWLA and UTSMS to set up the CELS project officially and financially. This contract is now in the process of being "negotiated" and approved.

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*An acronym for Continuing Education for Librarians in the Southwest.

IV. Project No. 3: Regional Institute For Training In Library Service For The Disadvantaged

USOE, in March, notified SWLA and other co-sponsors that it will approve a $10,000 grant for a pilot, three-day invitational workshop on Library Service for the Southwest region. The workshop will be co-sponsored by the ALA Advisory Committee on Library Service to the Disadvantaged (LSD), the University of Oklahoma School of Library Science, and SLICE. The University of Oklahoma will assume fiscal responsibility for the grant and will, in turn, sub-contract with Ms. Virginia H. Mathews, Director of the National Book Committee, to plan and execute the workshop. SLICE, through its Office Director and Council, will assume responsibility for handling invitations to the workshop and for follow-up action on coordinating regional planning for service to the disadvantaged. Dates for the workshop are October 5-7, 1972 and it will be held on the University of Oklahoma campus at the Oklahoma Center for Continuing Education.

In October, 1971, SWLA accepted the invitation from the ALA Advisory Committee on LSD to jointly seek funding for a model, regional workshop in the Southwest. In January, an informal proposal for funding was submitted to Frank Stevens, Chief of the Library Training and Resources Branch, Division of Library Programs, USOE, requesting up to $18,000 for the workshop. The workshop proposed four basic objectives:

1. To stimulate planning and action on a regional pilot basis for cross-cultural and user-development services to all types of disadvantaged people;

2. to strengthen the role of the regional library association in assisting libraries within the region to mount meaningful programs;

3. to develop a model for eliciting perceptions of needs and present adequacy of libraries in meeting them from spokesmen for various disadvantaged user groups;

4. to provide some initial guidance to the ALA Office for Library Service to the Disadvantaged as to how it can best operate to support local and regional efforts and integrate a national effort with them for a cohesive whole, especially its role in consultant services.

This Institute is an example of interstate interinstitutional cooperation! SLICE is pleased to be one of the co-sponsors and hopes to illustrate a viable SLICE function during and in follow-up of the Institute.

V. Possible New SLICE Projects

As discussed in the First Quarterly Report, one measure of the viability of SLICE will be the number and type of new interstate cooperative ventures stimulated during the first year. As S.O.D. traveled the region this quarter in presenting the SLICE/MARC-O workshops, possible new SLICE projects were discussed. Those of merit or potential were presented to the SLICE Advisory Council on March 3rd and are summarized in Attachment D. The Council action on each is indicated.

Since March 3rd, SLICE has been approached by a state library outside the region to explore the possibility of SLICE assisting in the development and evaluation of a multi-state bibliographic center.

S.O.D. will continue to emphasize the stimulation of viable interstate projects during presentations at each of the five library association spring conferences in April. The message is "Think Regionally" - and do something about it!

During the March 3rd Advisory Council meeting, eleven specific SLICE tasks were identified as important projects for the second year. These were:

1. Serve as a regional clearinghouse for identifying sources of expertise.

2. Provide direct consulting services from SLICE staff (for specified number of days, etc.).

3. Coordinate and promote continuing education programs and projects involving two or more states.

4. Pursue continuing education for librarianship at two levels: a) provide packaged materials, b) train persons to conduct workshops, etc.

5. Provide coordination of centralized addressing services for state association memberships, if desired by the associations.

6. Plan and coordinate training for state library agency evaluation specialists.

7. Assist in conducting workshops for training state library association officers, etc.; concentrate on techniques for developing and adapting to changes in the associations.

8. Investigate potential for developing state document bibliographic controls and regional sharing of state document information.

9. Investigate development of MARC Data Base for processing information, etc.

10. Investigate development of MARC Data Base for A-V materials especially designed to serve state educational agencies.

11. Investigate development of an ERIC service structured on an S.D.I. data base.

To restate the SLICE philosophy: It is believed that the sharing of library-related resources, services, and expertise among the six SWLA states will lead to improved library services for the citizens of these states. SLICE is an experiment in the viability of an interstate organization devoted to evaluate this concept through action programs. The ultimate test of the SLICE concept will be the stimulation of meaningful interstate programs. S.O.D. will continue to work toward that objective.

VI. Extracurricular Activity

During this quarter, S.O.D. was involved in several projects related to SLICE, but not actually or formally part of SLICE projects.

Through various ALA Committees, S.O.D. participated in developing a resolution on the use of CATV channels for library-related functions and in program planning for the June ALA Conference session on library networks.

Through TALON (South Central Regional Medical Library Program), the National Library Of Medicine policy on not using MARC format will be questioned as a result of SLICE/TALON exchange.

Work continued with the Dallas Area Library Planning Council and the Irving Citizens Task Force on Library Services. The Final Report of A Library Inter-Network Study Demonstration and Pilot Model was delivered to the Texas State Library on March 15th.

The work done for TALON on a Network Management Information System was published in the Journal Of Library Automation*

S.O.D. agreed to serve as consultant on a regional medical library research project proposal prepared by S. M. U. This will be an effort to develop operational and evaluative parameters for multi-state library networks. If funded, the project will be for three years and require only one day a month (approximately) of S.O.D.'s time.

*"A Computer System for Effective Management of a Medical Library Network", Journal of Library Automation, Vol. 4, No. 4, Dec., 1971, p. 213.

VII. Budget And Finance

The budget and expenditure details are listed in Attachment D. These are direct cost expenditures from the SLICE Office only. The costs to ODL for the SLICE/MARC-O Project and Mr. Bierman's travel are contributed by ODL. Mr. Brawner's cost and the majority of the costs encountered by the Executive Committee and the Advisory Council are contributed to the project. The indirect costs for the SLICE Office are contributed by UTSMS. Each state library agency has also contributed costs of long distance calls and workshops production and related travel for attendees in their state.

Frankly, the project would not be possible without these very generous contributions. Even with these contributions, the budget is going to be very tight as travel requirements increase in the spring.

The high cost of printing of multiple copies of various SLICE reports has also exceeded budget. Budget adjustments will be necessary during the remainder of the project. The funding of the CELS project and O.E.-related funding for the Preconference Institute will provide financial relief during the next six months. Funding sources and "cash flow" requirements for the next year will be identified during the next quarter. If SLICE provides useful programs, funding should not be a problem. If SLICE is not effective and is not serving a purpose, then funding should not be expected. Perhaps the <u>real</u> test of the viability of SLICE is the procurement of adequate funding!

VIII. Acknowlegements

Although this is a quarterly report on the SLICE Office activities, it should be emphasized that SLICE would not even exist if it were not for the support and contributions of many, many persons. SLICE is really a regional concept and the real activities of SLICE are those things happening in each state and among the librarians in the states. The SLICE Office is really only an instrument for assisting a state to achieve certain goals; the environment that makes SLICE possible is really created by the states. S.O.D. then tries to produce the desired "product" within that environment. So, really, this quarterly report is offered as a staff report prepared by S.O.D. as a staff function for all the SLICE Advisory Council members and SWLA President. SLICE is a project of SWLA and any progress or achievements reported herein are the results of the interest and efforts and help and enthusiasm and vision of many, many people. Without this "people support", SLICE and S.O.D. would achieve nothing.

Specific appreciation of support from the following is acknowledged this quarter:

Lee Brawner and Executive Committee

Dr. Donald Hendricks and UTSMS

MARC-O Task Force

Sponsors of Workshops

Editors of State Association Journals

Program Chairmen of Associations

ODL - Ralph Funk

SWLA Executive Committee

SLICE Advisory Council

SWLA Editor of Newsletter

SWLA Representative in each state

Jan Kee and Ray Fry

Mary Blundell, SLICE Secretary

ATTACHMENT A

SLICE COUNCIL
Report of Meeting
Love Field Conference Room, Dallas, Texas
Friday, March 3, 1972

The meeting began at 10 a.m. Attending the meeting were:

Ariz: Mrs. Cooley, Dept. of Lib/Archives
Miss Betty Thomas, ASLA President
Ark: Mrs. Frances Neal, Ark. Lib. Commission
Mrs. Alice Gray, Ark. L.A., Pres.-Elect
La: Miss Sallie Farrell, La. State Library
N.M.: Mr. Ed Dowlin, N.M. State Library
Miss Peggy Tozer, NMLA, President
Okla.: Mr. Ralph Funk, Okla. Dept. of Lib.
Tex: Mr. Bill Gooch, Tex. State Lib.
Mrs. Phyllis Burson, TLA, Immed. Past President
Dr. Donald D. Hendricks, Lib. Dir. U.T.S.W. Med. School at Dallas
Mr. Ken Bierman, Data Proc. Coord., Oklahoma Department of Libraries
Mr. Pearce Grove, SLICE Consultant
Miss Janice Kee, SLICE Consultant
Miss Mary Blundell, SLICE Office Sec.
Miss Maryann Duggan, SLICE Office Dir.
Mr. Lee Brawner, SLICE Council Chm.

Brawner introduced Dr. Hendricks, Library Director of the U.T. Southwestern Medical School at Dallas (UTSMS) and Director of the South Central Regional Medical Library Program and added that Dr. Hendricks was instrumental in helping arrange the SWLA SLICE Project contract with UTSMS.

Duggan and Bierman presented a status report on the SLICE MARC-O Workshops for the first five months of the Project, noting that the purpose of the workshops is to educate librarians concerning MARC services, present and potential; to show what MARC-O can and can't do; to develop an educational module based on MARC-O. The SLICE Office and MARC-O (Oklahoma Dept. of Libraries) have prepared and distributed over 200 Description of Services brochures and over 100 of the Users Manual describing the Cataloging Data Search and Print Service. Numerous news releases concerning the MARC-O Project have been sent to the state and national library press; the SLICE Office continues to receive numerous inquiries nationally and internationally (including one from Sheffield, England) about MARC-O.

Duggan and Bierman have presented seven MARC-O Workshops in four states and future workshops are set for Austin, Texas on March 9, Phoenix, Arizona on March 13, in Dallas, Texas on March 29 and in Fayetteville, Arkansas on April 21.

Discussion focused on cirteria for evaluating effectiveness of the workshops. SLICE Office will pursue development of additional measuring tools for same. Observation was made that the workshops are not attracting enough key librarians from the major libraries, especially academic, to them. Consideration will be given to scheduling mini MARC-O users workshops designed to bring these people in.

Brawner said that while SLICE could not receive additional funding from the Council on Library Resources (CLR) for the SLICE Office costs or for continuing the present MARC-O Project that CLR had indicated it would be "receptive" to future related MARC projects. He called on Bierman for his response regarding future MARC projects.

Bierman responded with background materials on the SLICE MARC-O Project and presented three possible alternatives for discussion; see Attachment A. Discussion included a statement by Bierman that MARC-O could not expect to be funded from "users' fees" next year even though the number of users is increasing; numerous suggestions to pursue Alternative 3 for a regional concept; statement by Farrell that a study committee in Louisiana composed in part of Dr. Gribbin of Tulane and Lawrence Livingston from the CLR Staff and others working with the Louisiana Numerical Register Committee and the

Louisiana Planning Committee are investigating the development of a data base; Duggan suggested immediate communication to establish liaison with the Louisiana principals involved; Hendricks added that the University of Texas system is also interested in the utilization of MARC and may be interested in participating with SLICE in a jointly funded planning grant to pursue the feasibility of a regional data base. Kee suggeste that SLICE should build on its experience, continue interstate programs, keep working on continuing education and at the same time be planning regional operations.

Bierman presented a report on his recent visit to the Ohio College Library Center in Columbus, Ohio (see Attachment B). Discussion followed concerning feasibility of a dedicated computer hardware for a regional data base in the SW region.

Council authorized Brawner as Chairman to choose a Task Force to write a proposal for funding a study designed to investigate the feasibility of developing and implementing MARC data bases in the six-state region. The study should include the possibility of inter-facing with other like projects such as the La-LNR. Study should include consideration of establishing a legal base for any on-going data base operatio to enhance the opportunities for funding from the respective state legislatures.

Brawner said he would select the Task Force and have it meet later in March.

The goals, budget and timetable for SLICE Project 2 CELS (Continuing Education for Librarians in the Southwest) were reviewed. This information was included in the First Quarterly Report as Attachment D. The timetable for initiating the Project depends on the selection of the part-time Project Director. As reported in the January 24, 1972 Meeting Report of the SLICE Executive Committee, Brawner said he is optomistic that SLICE may be able to get a grant from the U.S. Office of Education to underwrite and expand on the demonstration portion (includes a pre-conference on "library management techniques in New Orleans) of the CELS Project. If the O.E. grant is received the CELS budget can be revised accordingly. Burson moved that the O.E. proposal for funding be submitted immediately; Funk seconded; motion passed. SOD said the proposal would be completed and submitted the following week. Suggested names of persons for the part-time position of Project Director included: Ed Low, Calvin Boyer, University of Texas; Terry Crowley, University of Illinois; Travis Tyler, Barbara Conroy, Genevieve Casey, Kitty Stokes, U.S.O.E., and Marie Shultz, Ph.D. student at University of Texas Graduate School of L.S.

The part-time "state surveyors" who will assist in the CELS Project will be selected by the respective State Library Agencies in consultation with the State Library Association member on the SLICE Council.

SOD reported that the SLICE Office had received a number of informal proposals involving possible interstate library projects but that to date, no proposals had been submitted in the format adopted by SLICE (see First Quarterly Report, Attachment E) and therefore none of the proposals had been reviewed by the SLICE Executive Committee for presentation to Council for action at this meeting. The following proposals were brought to the attention of Council:

1. COSMOS Project from CORAL (Council of Research and Academic Libraries) Information on the Project was submitted to Council in the January 24, 1971 Executive Committee minutes. The Council on Library Resources has notified CORAL it will not fund the project; in their letter CLR said "It is our view that the feasibility of automated regional library systems has already been demonstrated."

2. Two proposals from Tulane University: a conference on use of the 1970 Census Tapes; a seminar on current reference/bibliographic sources and methodology.

3. Proposal from Kee to provide library training for intermediary personnel (i.e. people who live in the disadvantaged areas) working with library programs for the disadvantaged. Dowlin said that---time and personnel allowing---the N.M. State Library would consider applying for a research grant to provide training materials (manuals, etc.) to help meet this need and that the project would utilize SLICE in preparing the proposal and in promoting the project if funded.

4. Proposal from the Oklahoma Department of Libraries for interstate participation in a Children's Summer Reading Program. Funk distributed an outline of the proposal (see Attachment C). Suggestions from Council included: focus future summer programs on the Right to Read; to have Oklahoma send out sample packets of the materials with price information to the regional states for their individual response; to investigate cooperative program with the Texas State Library if the printing could be done cheaper there and if Texas were interested.

5. Arizona proposal for production of "talking books" or recordings in Spanish for blind users.

6. New Mexico proposal to establish a regional ERIC/S.D.I. Service.

7. Proposal from Miss Virginia Mathews, Director of the National Book Committee, to host a regional workshop on Library Service to the Disadvantaged.

The State Library Agency representatives on SLICE Council were asked to submit their selected mailing lists of librarians in their respective States who will be placed on the SLICE Office mailing list for the monthly and quarterly reports. Several State lists were turned in and others will be submitted in the near future.

Brawner said that the SLICE Executive Committee had reviewed the matter of future funding for the SLICE Office, that is, funds to staff and operate the SLICE Office only and not funds for actual Projects. The initial funding ($25,000 from CLR plus in-kind support from the University of Texas S.W. Medical School) expires in September 1972. Considering that the SLICE Office operations should be self-supporting from the region, the Executive Committee recognized three obvious sources of funding: 1) from SWLA; 2) from the State Library Agencies and 3) from the State Library Associations.

Assuming that U.T.S.W. Medical School would be agreeable to a similar contract for the second year and assuming a second-year budget of $25,000 apart from in-kind services, the Executive Committee recommends for Council consideration that the State Library Agencies each plan to contribute up to $4,000 to the SLICE Office project; that SWLA plan to increase its contribution (to perhaps $2,000 minimum); that State Library Associations plan no direct funding of SLICE, but instead plan to budget travel expenses for their representatives on the SLICE Council.

The Executive Commitee recognizes that State Library Agencies cannot consider funding any project unless they can cite a "product" to justify the expenditure. The Committee has identified the following inventory of possible "products" to be realized from a funded, operational SLICE Office:

1. Serve as a regional clearinghouse for identifying sources of expertise.

2. Provide direct consulting services from SLICE staff (for specified number of days, etc.).

3. Coordinate and promote continuing education programs and projects involving two or more states.

4. Provide coordination of centralized addressing services for state association memberships.

5. Pursue continuing education for librarianship at two levels: a) provide packaged materials, b) train persons to conduct workshops, etc.

6. Plan and coordinate training for state library agency specialists.

7. Assist in conducting workshops for training state library association officers, etc.; concentrate on techniques for developing and adapting to changes in the associations.

8. Investigate potential for developing state document bibliographic controls and regional sharing of state document information.

9. Investigate development of MARC data base for processing information, etc.

10. Investigate development of MARC data base for A-V materials especially designed to serve state educational agencies.

11. Investigate development of an ERIC service structured on an S.D.I. data base.

Council members generally agreed that the first three "products" alone could justify support of the SLICE Office at the $4,000 level. It was underscored that the SLICE Office would continue to review and evaluate proposed projects and to assist in promoting and initiating projects, but that each project would be self-funded.

The Council discussed L.S.C.A. funding and noted that the most appropriate funding for the SLICE Office Project is under Title III INTERLIBRARY COOPERATION. Kee presented an informal status report on proposed LSCA Allotments for Federal Fiscal Year 1973 (see Attachment D).

State Library Agency representatives on Council requested that a means other than "institutional membership" be devised by SWLA or SLICE for requesting the $4,000 amounts from them next year. This will be included in the charge to the special SLICE Task Force.

The Executive Committee submitted a proposal to re-organize the SLICE Council (see Attachment E for proposal). The Council approved the proposal.

In a related matter the Council urged that SLICE should budget funds to defray the travel expenses of the SLICE Executive Committee members as necessary. The Council also urged that State Library Associations should budget funds in their respective budgets to defray travel expenses for their SLICE Council members to attend at least two Council meetings annually.

It was agreed that the next meeting of the SLICE Council would be held on Saturday, November 4, 1972 in New Orleans following the Joint SELA/SWLA Conference. The meeting will begin at 3 p.m. and conclude with a dinner. Council members will be sent reminders and details on the meeting place.

Council members expressed satisfaction with the arrangements for this meeting allowing them to meet in the Love Field Terminal in Dallas. The arrangements allowed most of the members to fly in and out of Dallas on the same day. When ever possible subsequent meetings of Council will follow this format.

Meeting adjourned.

cc: Rouse
Chesson
Sheldon
Winfrey
Ard
Franklin
Thomas, Della
Eaton
Martin

ATTACHMENT A

ALTERNATIVES FOR FUTURE DEVELOPMENT OF THE SLICE/MARC PROJECT

As seen by Kenneth J. Bierman, Data Processing Coordinator
Oklahoma Department of Libraries
March, 1972

BACKGROUND

This first year of SLICE/MARC-O is indeed an exciting one. Through SLICE, key librarians in all the six SLICE states have had an opportunity to be introduced to MARC--- what it is and what some of its potential is. Further, through SLICE, libraries of all types and sizes in each state have had the opportunity to get acquainted with MARC by actually using it for various services and products. The question which the SLICE Board must decide is: where do we go from here?

As I see it, SLICE has three alternatives in terms of the SLICE/MARC project. They are outlined as clearly and succinctly as possible below. One word of caution: these are the alternatives as I see them. There may be (and surely are) other alternatives as well as variations and options between these alternatives.

Alternative 1

SLICE can abandon the SLICE/MARC project altogether.

Alternative 2

SLICE can continue for an additional period of time beyond the first year with the same objectives as the first year; that is, (1) education of librarians in the region about MARC and its potential, (2) making available MARC-O services to other libraries in the region at cost, and (3) coordinating other MARC services within the region.

Alternative 3

SLICE can expand its present MARC activities to look, plan and work toward the goal of using MARC as the heart of a true system of interlibrary development and communication -- i.e. a true regional network.

INITIAL ESTIMATES OF COST OF IMPLEMENTATION YEAR FOR OCLC SYSTEM IN THE SOUTHWEST

Salaries:

Project Director (12 months).....	$25,000.00	
Administrative Assistant (11 months).....	11,000.00	
PR & Education Director (11 months).....	13,000.00	
Secretary (12 months).....	8,000.00	
Senior Systems Programmer (9 months).....	13,400.00	
Assistant Programmer (8 months).....	8,000.00	
Computer operations (2 for 2 months).....	2,400.00	
Processing Clerks (2 for 2 months).....	2,000.00	
TOTAL	$82,800.00	+ 16,500 (20%)= 99,300

Space: (Hopefully, this might be donated by some existing institution)

Office Expenses:

Equipment (desks, etc.).....	$10,000.00
Supplies (paper, etc.).....	5,000.00
Telephone.....	2,000.00
Misc.....	5,000.00
TOTAL	$22,000.00

Travel Expenses.....	$10,000.00
Consulting fees to OCLC.....	10,000.00
Computer Expenses (3 months).....	58,700.00
Terminal Expenses (2 months, paid by using library):	
Line Costs (2 months).....	30,000.00
Card Stock.....	20,000.00
Other.....	50,000.00
Total Cost of First Year.....	300,000.00

Proposed Source of these Funds:

From the State Libraries	$ 60,000.00
From the Participating libraries..	90,000.00
From CLR and/or OE.....	$150,000.00

Suggested procedure of Alternative 3 is selected.

What must be done?

1. First, the OCLC system must be seriously and completely evaluated as a potential vehicle to be used to accomplish the goal because it is already developed and available. Will the OCLC system meet the needs of the Southwest? That, it seems to me, is a basic question.

2. If the OCLC system will meet the needs of the Southwest, then an attack of massive education must be begun. (continuing education, anyone?) This might be accomplished in several ways: (1) demonstration of the OCLC system to librarians in the Southwest by exporting them for a day to Ohio, or (2) demonstration of the OCLC system by installation of terminals in the Southwest connected to the Ohio computer for a demonstration period, and (3) explanation of the OCLC system to librarians in the Southwest with the use of slides, and perhaps even a movie if not too expensive.

3. If the education period, a serious market survey should be made to determine how many and which libraries in the Southwest are seriously ready to enter such a system (cash on the barrel head). Out of this should come the final selection of at least 50 initial participants.

4. Assuming there is enough potential use to support such a system (a minimum of 300,000 titles per year), detailed planning must be done for implementation of the system in the Southwest including (1) sending the system programmer to OCLC for 6 months to learn the system and programs, (2) sending the project director to Ohio for at least a month to learn administrative and training details as well as more detailed information on the operation of the system, (3) educating the libraries of the Initial Participant libraries on use of the terminals, etc., (4) ordering of all needed equipment (computer, terminals, communication line arrangement, etc.) so that all gels together, (5) implement as an on-going service the operating system, and (6) beyond this implementation, plans for future development (R & D) should be coordinated with the OCLC so that there will be a minimum of duplication of effort and a maximum of compatability of newly designed modules of the system.

ATTACHMENT B

MEMORANDUM

TO: Oklahoma Department of Libraries, and SLICE Office and Board

FROM: K. J. Bierman, Data Processing Coordinator

DATE: February 28, 1972

SUBJECT: Report on OCLC (Ohio College Library Center) trip

Attached please find my report of the Ohio College Library Center. I arrived in Columbus, Ohio Sunday evening, February 6 at 9:00 and was greeted by a falling blanket of snow. Monday morning I met Mr. Bob Divett, Head, New Mexico Medical Library and we arrived at the OCLC center (a rather old building now used as a Research Center) at 9:30 and spent from 9:30 to 11:00 in a discussion with Fred Kilgour, Director. From 11:00 to 11:05 we had a training session on how to catalog books using the OCLC terminals and from 11:05 to 12:00 we were left alone with a terminal and I had the time of my life playing. From 12:00 to 1:30 we had lunch at the Faculty Club of Ohio State University. While at lunch we picked up about 8 academic librarians from the State of Wisconsin. From 1:30 to 2:30 Fred "lectured" about the system--its development, economics, etc. From 2:30 to 3:00 I (as a now fully trained user of the system having had 5 minutes of instruction) demonstrated the system to the Wisconsin people. They played from 3:00 to 3:30. From 3:30 to 5:00 we had a general discussion of the possibilities of importing an OCLC system to other regions. On Tuesday we visited with representatives of two users (Ohio State University and the Ohio State Library) and one potential user (Chemical Abstracts) to get some preliminary user reactions. I returned to the land of milk and honey (otherwise known as Oklahoma) at midnight Tuesday night or Wednesday morning (whichever way you look at it).

cc: Bob Divett
Fred Kilgour

REPORT ON VISIT TO THE OHIO COLLEGE LIBRARY CENTER

by Kenneth Bierman, Data Processing Coordinator
Oklahoma Department of Libraries
February, 1972

OVERVIEW OF OCLC SYSTEM

I am not going to present a detailed explanation of what the OCLC is or what it does because this information is already available in the literature (see bibliography at end of report). However, I am going to try to give an overview summary of what the OCLC is and what it is doing and plans to do. This overview summary will provide enough information for someone who knows little or nothing about OCLC to understand the remainder of this report but he should understand that this brief preliminary information is just that--preliminary information.

The Ohio College Library Center is probably the most outstanding example of utilization of MARC available anywhere in the world (editorial opinion by the author). The Center was actually charted in 1967; however, work on its concept had begun in 1961 when academic librarians in Ohio began to work cooperatively toward what (at that time) they did not know. Objectives of the Center are to increase availability, region-wide, of resources in academic libraries to individual students and faculty, and at the same time to decrease the rate of rise of per-student library costs. The system has been under development for over five years and has already passed through on off-line catalog card set production system and in 1971 entered the 1970's with an on-line system. The Center has designed five on-line sub-systems: (1) shared cataloging; (2) serials control; (3) technical processing: (4) user remote catalog access and circulation control; and (5) user access by subject and title.

The shared cataloging system (on-line) became operational in 1971. Serials control is now under development. The remaining sub-systems are to be developed over the next five year period. The shared cataloging system is what the remainder of this report is about. But remember, this is but one of five planned-for sub-systems in the long range development.

The three main products of shared cataloging are 1) individualized catalog cards; 2) an on-line union catalog; and 3) a communications system for requesting interlibrary loans. In addition, the bibliographic and location information in the system is used for other purposes such as book selection and purchasing. Currently there are over 70 terminals in 49 academic libraries in Ohio. Each terminal presently consists of a typewriter keyboard and a CRT tube (a TV-like screen); an experimental project will be begun soon where some terminals will

also have a typewriter as a third module of the terminal. All of these terminals are presently connected using voice grade communication channels (telephone lines). From these terminals, a user (i.e. cataloger or interlibrary loan librarian) can call up complete LC cataloging data (if it is in the data base) upon the screen by any of the following three means: (1) LC card number; (2) Title; (3) Author-Title. The data base consists of the total MARC Data Base (over 200,000 cataloging records) and the original cataloging done by the member libraries since initial operation (presently over 40,000 cataloging records); if the desired cataloging records is not in the data base, the cataloger can call up a worksheet which appears on the screen and proceed to do original cataloging right on the terminal--her original cataloging is then immediately available to any other cataloger in the system who also needs to catalog that book. The data appears on the screen in upper and lower case letters. The cataloger can then proceed to edit (change, delete, add) the information appearing on the screen by means of using the typewriter and request that all cards needed be printed that night (Figure 1 and Figure 2 are sample catalog cards). The interlibrary loan librarian can see what libraries have the book by means of library codes which appear on the screen and can proceed to initiate an interlibrary loan request to the nearest library having the desired book. All of this takes place in less than five seconds. The one computer being used serves all of the terminals--when I saw the computer I asked it (computer people can talk to computers you know!) how many of the 70 terminals had accessed it at least once in the last three minutes--it told me 53.

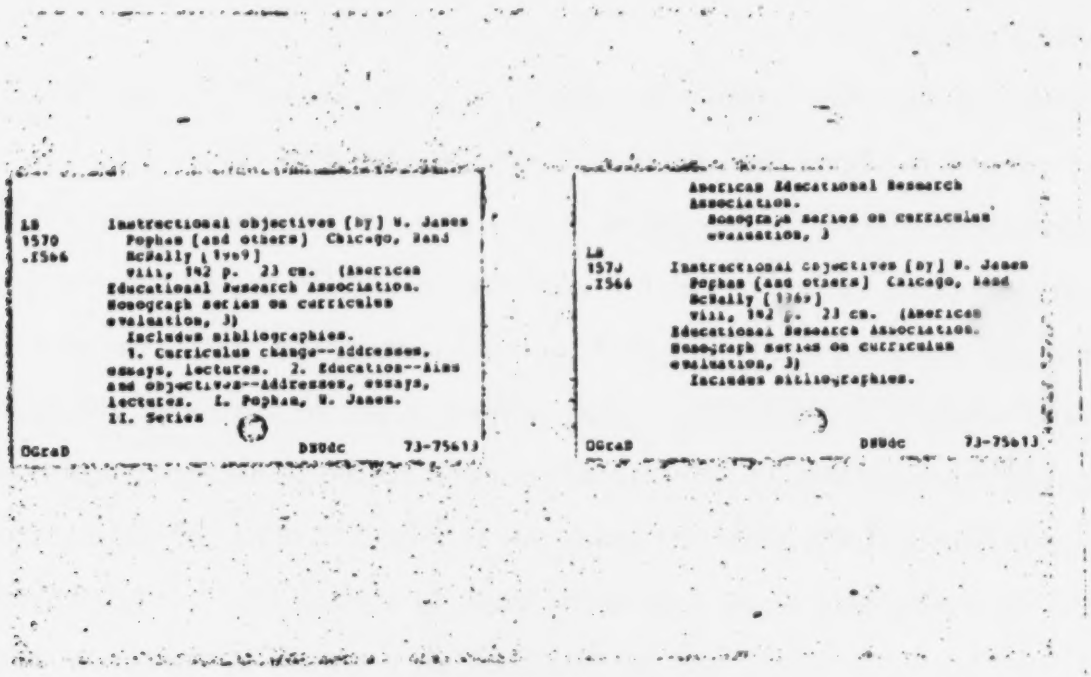
PERSONAL REACTIONS AT THE TERMINAL

Seeing is believing; and I am now a beliver. Fred Kilgour (OCLC Director) took me to a terminal in a conference room. He gave me about five minutes of instruction--yes, just five minutes. I had never used a CRT terminal before. He then gave me about 10 books, told me to catalog them, and left for another meeting for about an hour. I was left alone--just me and the CRT!

In the following hour I had the time of my life. All of my latent, secret desires to be a cataloger came out. First, I decided that I didn't want to catalog those books right away. Instead, I wanted to pick some books that I had recently read and see if I could "find" them--or rather, see if the computer could find them. The first book I searched was the title "Who Owns America."

FILMED FROM BEST AVAILABLE COPY

I keyed in the title search by typing WHO,O,A,, (the first three letters of the first word, followed by a comma, followed by the first letter of the next three words each separated by a comma). Well, before I could blink my eyes there appeared on the screen not one but two Who Owns America! The first one was numbered 1 and had the author, title, publisher and date (which I remember was 1971). The second one was numbered 2 and had the same information but was dated 1972.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Instructional objectives [by] W. James Popham [and others] Chicago, Rand McNally [1969]
viii, 142 p. 23 cm. (American Educational Research Association. Monograph series on curriculum evaluation, 3)
Includes bibliographies.
1. Curriculum change--Addresses, essays, lectures. 2. Education--Aims and objectives--Addresses, essays, lectures. I. Popham, W. James. II. Series
OGraD
D8Ddc
73-75613
American Educational Research Association.
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FIGURE 1
Individually formatted catalog cards.

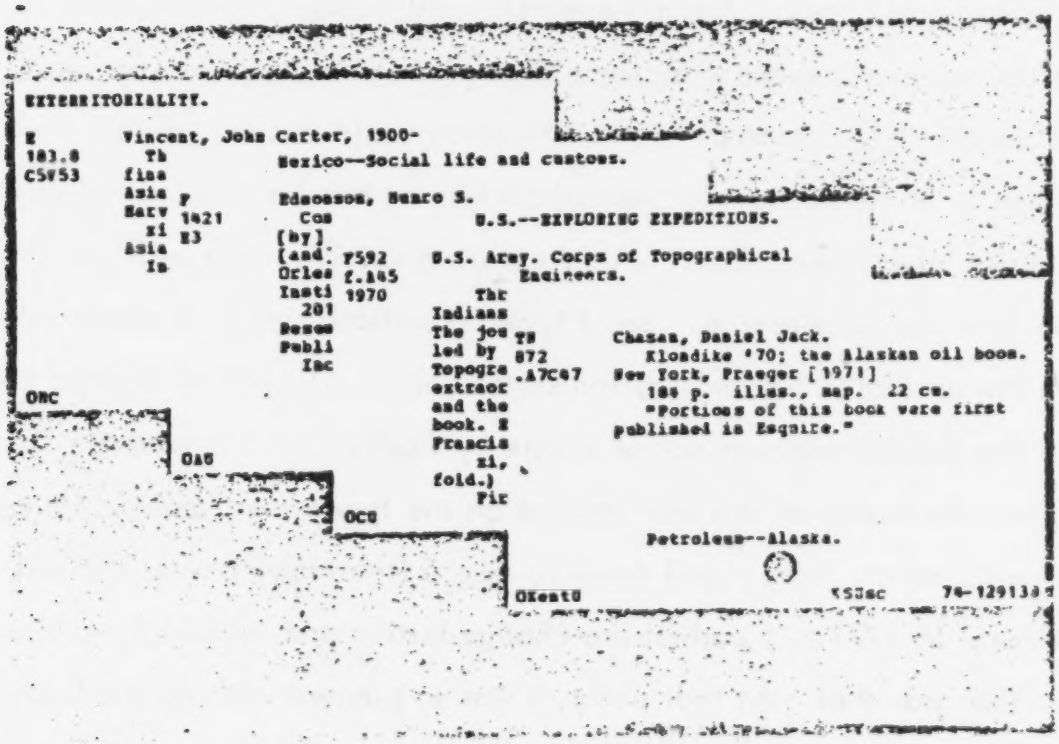

FIGURE 2
Catalog card formats for individual institutions.

space after the word MAPS (which was the title) and pushed the insert button--I then keyed AND ATLASSES and presto the two words AND ATLASSES were inserted in their proper place and the remainder of the title statement was simply moved over on the screen. Thus, I had changed the title. Then I decided to change one subject heading slightly and add a new one. Each of these two operations was done with ease. Finally, I decided to change the call number and then wrote the call number as I had changed it in the book and that was that. My card sets that were printed that night would look like I wanted them to look--all of my changes would be incorporated.

By then about 20 minutes had gone by (I am told by users that an average cataloger can catalog 20 books an hour on the system and the best can do 55 books an hour--or almost one book per minute). I continued playing and had the time of my life. When Fred returned he showed me how to do original cataloging on the system and explained that if I did original cataloging at 10:00 a.m. and another cataloging 300 miles away accessed the system at 10:05 and wanted cataloging data for the book I had just done she would find it! He explained that instead of requesting catalog cards to be printed, you could simply request that the record be saved. A junior cataloger could catalog and save and then at the end of the day (or week, or whatever time period desired) the senior cataloger could start calling up the records one at a time, do a final comparison with the book, make any last minute changes needed and then request catalog cards after this final editing.

REACTION TO SYSTEM BY SOME USERS

I did not have time to visit with any regular user of the OCLC system except the Ohio State Library. Mr. Joseph Shubert, State Librarian, said that reaction to the system once it was operating was extremely enthusiastic even among people who had apposed the idea for years. He said that now the public librarians, who had not been particularly interested, are visiting their academic counterparts and are becoming fanatical in their demand for a similar system--the State library receives a lot of requests from public librarians to consider such a system for public libraries.

COST OF THE SYSTEM AND HOW IT IS PAID

The operating costs for one year are approximately as follows:

Center Staff & Supplies (not R & D)	139,000
Computer rental	196,000
Terminals (70)	157,000
Communication Lines	129,000
TOTAL	620,000

The operating costs are retrieved as follows:

(1) Membership Fee. Every user pays a yearly membership fee based on size of library, book budget, etc. It varies from $900 to $10,000.

(2) Cost of cards. Each user is billed monthly for the actual cost to produce the cards for that user. This cost varies from month to month and averages about 5 cents per card.

(3) Subsidy from State.

The development (R & D) costs have been paid from outside grants and partly from membership fees.

POTENTIAL FOR EXPORTING TO OTHER REGIONS

The Ohio College Library Center is willing to work with other regional centers that may "become a part of any national electronic network for bibliographic communication." Mr. Kilgour believes that the system could be picked up and exported as is to another region assuming that did careful planning, had adequate aid, competent staff, and got the same kind of computer, terminals, etc. This has not been done yet but likely will be done in the near future in the New England Region. Also, the system should work *equally well* for public libraries as for academic libraries.

IMPLICATIONS FOR SLICE/MARC PROJECT

I feel it would be a gross mistake for SLICE not to seriously look at the OCLC as a potential model for MARC development in the Southwest if the desire of SLICE is to utilize MARC as the heart of the beginning of a true cooperative regional network (as opposed to the utilization of MARC to provide specific services as requested in an off-line environment). SLICE should plan for a complete and thorough study of the OCLC system (from both the library and computer point of view), interview as many actual users as possible, evaluate the need and desire for such a system in the Southwest, and finally evaluate the OCLC system for possible "lifting" to meet the needs of the Southwest.

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2. Kilgour, Frederick G. "Concept of an On-Line Computerized Library Catalog" JOURNAL OF LIBRARY AUTOMATION, V. 3 N. 1 (March, 1970) pp. 1-11.
Discusses the concept of an on-line system.

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An up-to-date explanation and study of the on-line cataloging system of OCLC.

4. Kilgour, Frederick G. "The Shared Cataloging System of the Ohio College Library Center" Preprint. 34 pages (Interlibrary loan copies available from the Data Processing Office, Oklahoma Department of Libraries, 109 State Capitol, Oklahoma City, Oklahoma 73105)
The most up-to-date and comprehensive introduction and discussion of the Ohio College Library Center.

TECHNICAL ARTICLES

5. Kilgour, Frederick G, Long, Philip L., and Leiderman, Eugene B., "Retrieval of Bibliographic Entries from a Name-Title Catalog by Use of Truncated Search Keys," PROCEEDINGS OF THE AMERICAN SOCIETY FOR INFORMATION SCIENCE, 7 (1970), pp. 79-82

6. Kilgour, Frederick G., Long, Philip L., Leiderman, Eugene B, and Landgraf, Alan L., "Title-only Entries Retrieved by Use of Truncated Search Keys," JOURNAL OF LIBRARY AUTOMATION, (December 1971), pp. 207-210.

7. Long, Philip L. and Kilgour, Frederick G, "Name-title Entry Retrieval from a MARC File," JOURNAL OF LIBRARY AUTOMATION, V. 4 N. 4 (December 1971), pp. 211-212.

8. Long, P. L. "Large On-Line Files of Bibliographic Data: An Efficient Design and a Mathematical Predictor of Retrieval Behavior," to be published in INFORMATION PROCESSING 71, North-Holland Publishing Company, Amsterdam, 1972. 5 pages.

ATTACHMENT C

Proposal for New SLICE Project

1. Name of Proposed Project -
   CHILDREN'S SUMMER READING PROGRAM planned and produced cooperatively so far as theme, materials, and basic philosophy, leaving other details of use, administration, and distribution to individual States.

2. Person submitting proposal -
   Oklahoma Department of Libraries (Mary Ann Wentroth, Public Library Consultant for Children's Services)
   109 State Capitol
   Oklahoma City, Oklahoma 73105 (405) 521-3673

3. Objectives of the project -

   a. Sharing of expertise and experience in a specialized area of service.
   b. Taking advantage of opportunities to economize on quantity printing of supplies.
   c. Making available a well planned but flexible program to local libraries lacking staff time and expertise.
   d. Provide another means for rewarding interstate experience for State Library staffs, and opportunity for a rewarding relationship between the various State Libraries and the public libraries within their states.
   e. Providing further opportunities for individual public libraries to reach out to non-users and disadvantaged.
   f. Provide an opportunity for training workshops for children's librarians, and, in small libraries, for the generalist who has to do children's work as part of the job.

4. Participating states and names of individuals involved -
   Oklahoma is definitely interested.
   New Mexico has expressed considerable interest.
   Texas has made tentative inquiries.

5. Time period of the project -
   Planning for the summer of 1973 should begin by August, 1972 with evaluation in September of October of 1973.

6. Description of the project -

   Representatives of Southwestern states meet and plan theme, materials, and outline suggested program ideas for a children's summer reading project similar to that initiated by Florida State Library in 1967, shared by Oklahoma 1968-1971, and by New Mexico in 1972.

   Philosophy underlying this program puts emphasis on the pleasure of reading for itself rather than rewarding quantity reading. Program plans are flexible enough to be used by libraries of various sizes and offer suggestions aimed at stimulating creative efforts from staff or volunteers.

   Manual and sample materials show details of planning.

7. Need or benefit of the project -

Provides a way of offering a "good" program as a substitute for "poor" programs which are often found in smaller libraries.

Provides a means of building good will for the state agencies among the libraries of the state. This has been proved in our experience.

8. Estimated budget or costs -

Cost to Oklahoma for 1971 program in which Oklahoma, Florida, and Wisconsin participated $3,689.08

(This included $2,943.83 for printed supplies,
additional local printing for some promotional material,
Consultant's travel to Florida for planning,
Shipping costs,
And an estimate of Consultant's time spent exclusively on this project.

9. Suggested source of funds -

Each state pay its own share of expenses.

ATTACHMENT D

FISCAL REPORT -
LSCA Allotments, FY '72 and
Proposed, President's Budget, FY '73

	TITLE I	TITLE II	TITLE III
ARKANSAS			
FY '72	$ 535,902	$ 139,366	$ 44,855
FY '73	381,344	0	45,690
LOUISIANA			
FY '72	836,278	174,568	49,197
FY '73	543,509	0	50,779
NEW MEXICO			
FY '72	377,443	120,795	42,565
FY '73	295,797	0	43,006
OKLAHOMA			
FY '72	646,971	152,383	46,461
FY '73	441,307	0	47,572
TEXAS			
FY '72	2,155,499	329,174	68,266
FY '73	1,255,720	0	73,127
Arizona			
Fy '72	509,562	136,279	44,475
Fy '73	367,124	0	?
	I	II	III
Lsca			
'72.	46,568,500	9,500,000	2,281,0
'73	30,000 000	0	2,640,50

February 8, 1972

Attachment E

Proposal to Re-Organize the SLICE Council as follows:

A. Fiscal Year

The fiscal year for SLICE shall be January 1, through December 31, i.e. the calendar year.

B. Composition of SLICE Council

1) Heads of State Library Agencies in each SWLA State.

2) Vice President/President-elect of each state library association in SWLA.

3) President, Vice-President/President Elect, and immediate Past President of SWLA.

4) U.S.O.E. Regional Program Office shall be consultant to the Council.

Each member of the Council shall name an alternate at the time the member assumes office. The alternate will receive all communications and serve in the absence of the member. Alternates may observe Council meetings at any time, but may only when the Council member they represent is absent.

Vote

C. Composition of the SLICE Executive Committee

1) SWLA President. Elected biannually. Term from January 1, of odd years through December 31, of even years, coinciding with SWLA term for officers.

2) One state library agency Head and one state library agency Head Alternate elected for a biannual term ending December 31, of odd years.

3) One Representative and one Alternate Representative of state associations elected for an annual term ending December 31, in the year following expiration of their state term as Vice President/President-elect of their state association.

4) A SLICE Executive Committee Chairman elected biannually from the entire Council membership to serve a term concurrent with the SWLA Presidency.

5) In case of a vacating of an Executive Commitee position, that person's Alternate to the Executive Committee will serve in their place on the Executive Committee.

6) Elections to the Executive Committee will be held in the Fall meeting of the SLICE Advisory Council. Each member elected to the Executive Committee shall remain as a member of the Council until completion of his term on Executive Committee, even though as in the case of state associations, another representative comes on Council.

ATTACHMENT B

SLICE COUNCIL
PLANNING TASK FORCE
Summary of Meeting
University of Texas Southwestern Medical School
March 28, 1972

The meeting began at 9 a.m. Attending were:

Ken Bierman, SLICE/MARC-O Project Director
Ms. Mary Blundell, SLICE Office Secretary
Lee B. Brawner, Chairman, SLICE Council
Ed Dowlin, Director, N.M. State Library
Ms. Maryann Duggan, SLICE Office Director
Dr. Don Hendricks, Dir., Univ. of Texas Southwestern Medical School
Ms. Janice Kee, Library Services Program Officer, USOE Region VI, Dallas
Donald Simon, Systems Analyst, Univ. of Southwestern La. Library

Brawner reported that the SLICE Council (with representation included from all six state libraries) at its March 3 meeting agreed to fund Year-Two of the SLICE office at a minimum level of $25,000. Each of the six state libraries'agencies to provide $4,000 and SWLA to provide $1,000 or more. The Council authorized appointment of the Planning Task Force to accomplish the following:

1. Propose detailed, Year-Two SLICE Projects/Programs based on an evaluation of Year-One SLICE progress to date.

2. Draft a proposal for a long-range planning and design of a regional library system (data base) utilizing MARC and considering the integration of related programs such as the Louisiana Numerical Register (LNR).

3. Consider budget allocation and outside funding, as necessary, to implement the Year-Two projects/programs.

Brawner noted Simon was a member of the LNR committee and said that SLICE was keenly interested in pursuing the feasibility of collaborating with the LNR project. Simon overviewed the LNR project and displayed a copy of the initial LNR directory.

Duggan and Bierman evaluated the seven SLICE MARC-O workshops held to date throughout the six-state region in terms of actual and potential "market demand" they have generated for MARC-O services. Through the workshops, librarians in all six states have had an opportunity to be introduced to MARC and libraries of all types and sizes have had an opportunity to purchase the services.

Bierman presented a proposal for continued funding of the SLICE/MARC-O Project which set out two separate, but complimentary components:

First Component: Funding for Six SLICE/MARC-O Services and Continuing Education on MARC

Continuance of the presently identified five SLICE/MARC-O Services with the addition of a sixth service--subject searching of the entire MARC Data Base--and special continuing education emphasis on the potential of a MARC-based SDI service for specialized clientele, particularly State Government, Municipal Government and Academic Libraries, for 12 months beginning October 1, 1972 through September 30, 1973.

Estimated Costs:

A. Maintenance of MARC Data Base and continuance of presently available MARC Data Base Services: CATALOGING DATE SEARCH AND PRINT, MARC RECORD SEARCH AND COPY.

Contract with the Oklahoma Department of Libraries to include one/half the cost of maintaining the MARC Data Base ($600/mo.) . . . . . .$ 7,200

B. Continuance of presently available SDI CURRENT AWARENESS STANDARD and CUSTON Services.

No outside funding is needed to continue this project: the present and projected paying subscribers pay the full direct costs . . . . . -0-

C. Addition of a new SDI Service which provides the capability of searching the entire MARC Data Base by subject using a modified version of the search strategy used in the weekly SDI services.

Development (Programming) Costs 1,500
Operating costs will be completely paid by the users.

D. Three workshops to acquaint three target groups with the potential of SDI services based on MARC (both current weekly SDI and retrospective subject searching). Each workshop would last one week and would include actual subject profile preparation and actual searching of these profiles against a weekly MARC tape and then profile modification based on the output, etc. The three target groups are:

1. Library Service to State Government Structure workshop to include from each state, two people such as reference or legislative service librarians from the state library and at least one person from the Governor's Planning Agency.

2. Library Service to Municipal (City and/or County) Government
Structure workshop to include two people from each of the eight or so major municipal (public) libraries in the Southwest to be picked from applicants by the SLICE Council.

Workshop Preparation Costs (typing, postage, printing, etc.)
Three workshops @$400 each $1,200

One/half participants travel & expenses (the other half to be paid by the participant)
Three workshops with 18 participants each @$100. 5,400

Director Workshop Costs (Computer, Keypunch, etc.)
Three workshops @$1,000 each 3,000

Total for workshops. . . . . $ 9,600

E. Continuance of SLICE/MARC-O continuing education on MARC service via workshops, seminars, etc. in each of the six states.

Travel Expenses. 1,000
Preparation & Printing of Materials. 1,800
10% of SLICE Office Director's salary. 2,000
15% of SLICE/MARC-O Project Director's salary. . 1,900

Total for continuing education 6,700

TOTAL ESTIMATED COSTS FOR FIRST COMPONENT $25,000

Second Component: Long-Range Planning for Effective Regional Utilization of MARC

This component would develop a plan for the five-year period 1973-1978 which should be integrated with the five-year plans being developed by each state library agency under the federal Library Services and Construction Act.

Details and estimated cost breakdown have not been developed for this component.

Reception to the proposal was favorable and discussion on the Second Component was concerned with identifying some of the long-range objectives to be considered. Assuming that: 1) SLICE can develop the necessary legal base to satisfy each of the six states included to expedite state level funding, and that, 2) the geographical area concerned remains the six Southwestern states, the following assumptions were discussed:

1. There is a need for a viable, MARC data base in the region.

2. It should be developed in a manner that is useful, accessible and available to all types of libraries.

3. The data base should offer a variety of services.

4. Delivery of the services must be incremental beginning with manual batches and moving to on-line capability.

5. The ultimate objective would be the development of geographically dispersed, yet compatible nodes offering local services through state service centers operating from a regional headquarters.

6. As volume, usage, etc., justifies, a dedicated, library-automation computer should be obtained for the data base.

It was agreed that the SLICE Office Director could devote limited time to pursuing the Second Component, but that additional funding would be needed to perform the in-depth work and planning.

The following analysis of Year-Two for the SLICE Office was developed:

Activity	Percentage of Time for SLICE Office Director	Budget and Source of Funds
MARC-O First Component: Six MARC-O Services and Continuing Education for MARC	10%	$25,000 Seek outside funds
SLICE Office Projects: Continuing Education for Librarians in the Southwest (CELS) To be initiated in Year-One and completed in Year-Two	20%	$12,000 Received from State Library Agencies in Year-One
Context Input Process Product (CIPP) Evaluation of SLICE	20%	$ (?) Anticipate funding from USOE for the evaluation
MARC-O Second Component: Long-Range Planning for Effective Regional Utilization of MARC	30%	Portion of funding to be received from State Library Agenc and SWLA in Year-Tw plus added outside funding

The balance of the meeting discussion centered on suggested sources for additional outside or private funding, the identification of possible expertise from within the region who could assist SLICE with the long-range planning project. It was mentioned that the University of Texas System may be interested in cooperating with SLICE on the project; Hendricks said he would investigate the matter further. Duggan was also asked to contact Dean Stanley McElderry of the University of Texas Graduate Library School at Austin, to explore the possibility of utilizing any Ph.D. students in the project as the school has expressed an interest in the research and developments aspects of regional library development.

The meeting adjourned at 4 p.m.

Lee Brawner

Summary reported by Lee Brawner

Distribution of Report:

Task Force Participants
SLICE Council and Consultants
Della Thomas
Nancy Eaton

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Lee Brawner

Summary reported by Lee Brawner

Distribution of Report:

Task Force Participants
SLICE Council and Consultants
Della Thomas
Nancy Eaton

ATTACHMENT C

JOB DESCRIPTIONS OF CELS PROJECT DIRECTOR AND STATE SURVEYORS

Part-Time CELS Project Director On SLICE Office Contract

Purpose and Duties:

To assume SLICE Office staff responsibility for coordinating, planning, implementing, and reporting the two surveys in six states and to assist in the SWLA/SELA Preconference workshop in New Orleans.

Qualifications:

At least five years experience in library profession and preferably some experience in library education. Experience in project management desirable.

Masters Degree in library science minimum educational requirement. Skill in data collection, computation and analysis essential.

Employment Arrangement:

Position would be as a contract independent consultant through the SLICE Office for the period of the project (approximately May to December 1, 1972). Professional fees and travel expenses incurred in performing duties would be reimbursed by SLICE Office. Professional fee negotiable in line with contract duties.

Part-Time CELS Project Surveyor On SLICE Office Contract

Purpose and Duties:

To conduct the two CELS surveys in a given state under the guidance and coordination of the CELS Project Director and to report the findings in accordance with project requirements.

Qualifications:

At least five years experience in the library profession preferably at supervisory level. A minimum of fifth year degree in library science desirable. Skill in interviewing and collecting data essential.

Employment Arrangements:

Work would be performed as an independent contractor through the SLICE Office and under the supervision of the CELS Project Director. Approximate period of contract would be June - September, 1972, at fee and travel expenses to be negotiated.

ATTACHMENT D

SUMMARY OF SLICE BUDGET AND EXPENDITURES AS OF MARCH 31, 1972*

Item	Budget	Expenditures To Jan. 1, 1972	Expenditures 1/1/72 - 3/31/72	Total To 3/31/72	Balance
Salaries	$19,750.00	$5,035.58	$3,830.85	$8,866.43	$10,883.57
O.A.S.I.	673.00	42.66	260.81	303.47	369.53
Supplies and Telephone	2,077.00	1,093.40	782.14	1,875.54	201.46
Travel	2,500.00	226.16	990.08	1,216.24	1,283.76
Equipment	-	-	53.00	53.00	-
Total	$25,000.00	$6,397.80	$5,916.88	$12,314.68	$12,738.32

*Direct costs only; UTSMS contributes indirect costs (64.5% of salaries). The data are before audit.